

**Multi Function Service Configuration**

IncomingStatus	OutgoingStatus	SourceStatus	Application	
P	P	P	GeneralCapture	<a href="#">Delete</a>
P	P	P	Invoices	<a href="#">Delete</a>

**Add New Multi Function Configuration**

IncomingStatus:

OutgoingStatus:

SourceStatus:

Application:

[Insert](#)

## Tools Menu Tab

The Tools Menu Tab displays a list of complementary products that are licensed and available for you to use on your workstation, as shown below.

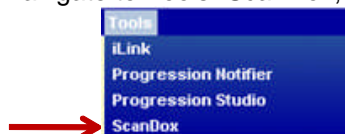


The purpose of the list of available to Tools is to allow permitted users to launch their own install which run automatically except for responding with a “Yes” to Download and Install prompt questions during the installation process.

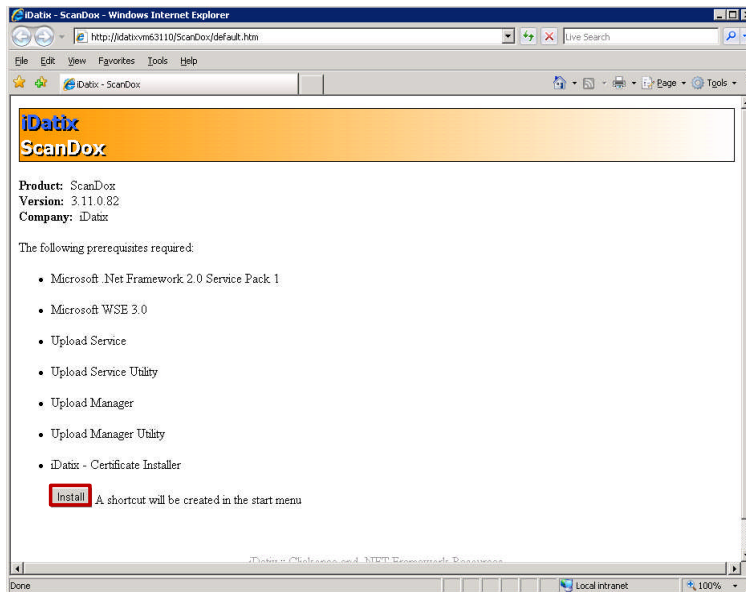
**Important Note:** Once you have completed the installation process for one of the Tools products such as ScanDox from this list, normally DO NOT click **Tools>ScanDox** again on the same workstation (unless you need to install it again, after it has been un-installed using Windows Control Panel).

To select and install a complementary iDatix product for use with iSynergy on your workstation, follow the steps below:

1. Navigate to Tools>ScanDox, as shown below.



2. After clicking the complementary product you wish to install, a browser window appears with a summary of the installation requirements for the product and a convenient **Install** button.



Note: If you have concerns as to whether the prerequisites are met or you encounter problems after installation, contact your iSynergy administrator or iDatix Support.

3. Click the *Install* button, to launch the download and installation processes.
4. Respond affirmatively to all prompts presented during the download and installation process.

*Note: Should download/installation exception conditions be reported preventing the full installation process from succeeding, make a note of the problem and/or print a screen image of the exception for your iSynergy administrator or iDatix Support.*

*You might also try restarting your workstation and repeating this installation procedure.*

5. At the end of a successful product installation, a shortcut icon will be placed on your desktop for you to conveniently start and use the product. Likewise, iSynergy may also provide a built-in means for launching and using the product you just installed.

*Note: Remember that now you have installed the complementary product, you normally will not need to use this Tools menu selection again. The Tools Menu Tab is just for doing installations. It is not the way to use the product after installation.*

# Appendix 1 – Creating an Application Checklist

## Application

Application Name (Virtual File Cabinet) \_\_\_\_\_

Application Description:

## Indexes

Indexes to be used as Search Criteria

(e.g. – SSN#, Name, Doc Type, Date, Status, etc...)

List the Index Display Order. What will be the most common Search parameter?

Order	Index Description	iSynergy Index Name	Index Type	UDL	Req	Sticky	ME	DB

Keep as Short as Possible for Data Entry

- Req = When manually indexing, index value must be supplied
- Sticky = When manually indexing, value remains after item is submitted

- ME = Multi-Edit; can change this value on several items at once (used for workflow)
- DB = Index will be pulled from an external Database

Is there an External Database to enhance the Data Entry Operation?

List Databases and their ODBC Names, Tables and Fields:

## User Defined Lists

List the "User Defined Lists" (UDL's) to be used as Index Values (Doc Types, Statuses etc...)

(Is there an external DB of these values that can be linked to?)

Attach a listing of all User Defined Lists

UDL Types

Name:	Name:	Name:	Name:


## Application Linking

List Other Applications that may have relevant information that will need to be cross-referenced to items stored in this Application. (For example the relationship between PO's, Invoices and Checks)

Other Related Applications

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_

List the common index fields between related Applications.

Other Related Indexes

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_

What will be the formal names of the indexes?

Formal Index Names

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_

## WorkFlow

List Fields to be used to drive Ad-Hoc Workflow (Status, Assigned User, Process ID) and management reports for production metrics.

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_

Draw a Flow diagram of Workflow Process:

## Security, Access and Permissions

Users First Name: \_\_\_\_\_

Users Last Name: \_\_\_\_\_

User ID: \_\_\_\_\_

User Password: \_\_\_\_\_

Permissions:

General Permissions		
<input type="checkbox"/> Annotation Add	<input type="checkbox"/> Annotation Edit	<input type="checkbox"/> Annotation View
<input type="checkbox"/> Application Add	<input type="checkbox"/> Application Delete	<input type="checkbox"/> Application Update
<input type="checkbox"/> Assignment	<input type="checkbox"/> Document Hard Delete	<input type="checkbox"/> Document Soft Delete
<input type="checkbox"/> Email	<input type="checkbox"/> Export	<input type="checkbox"/> Hide Redaction
<input type="checkbox"/> Import	<input type="checkbox"/> InBox	<input type="checkbox"/> Index Add
<input type="checkbox"/> Index Delete	<input type="checkbox"/> Index Type Add	<input type="checkbox"/> Index Type Delete
<input type="checkbox"/> Index Type Update	<input type="checkbox"/> Index Update	<input type="checkbox"/> Indexing Edit
<input type="checkbox"/> Indexing MultiEdit	<input type="checkbox"/> Note Add	<input type="checkbox"/> Note View
<input type="checkbox"/> Pre Sort Application	<input type="checkbox"/> Pre Sort Person	<input type="checkbox"/> Print Image
<input type="checkbox"/> Query Delete	<input type="checkbox"/> Query Save	<input type="checkbox"/> Remove Session
<input type="checkbox"/> Route Application	<input type="checkbox"/> Route Person	<input type="checkbox"/> Scan Image
<input type="checkbox"/> System Events	<input type="checkbox"/> System Options Update	<input type="checkbox"/> System Reporting
<input type="checkbox"/> User Add	<input type="checkbox"/> User Delete	<input type="checkbox"/> User Group Add
<input type="checkbox"/> User Group Delete	<input type="checkbox"/> User Group Update	<input type="checkbox"/> User List Add
<input type="checkbox"/> User List Delete	<input type="checkbox"/> User List Update	<input type="checkbox"/> User Update

☐ Select All Permissions

Application Access (What File Cabinets can be accessed?)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

Document Level Security (What UDL in a Cabinet can be Accessed?)

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_
- 4) \_\_\_\_\_
- 5) \_\_\_\_\_

## Appendix 2 – iSynergy Status

### Hard Coded Object Status Codes

- E:** Searchable Documents (Appear in the result set for a search in the system.)
- P:** Manual Indexing (Appear in the Manual Indexing screen for user intervention.)
- I:** Routed to Inbox (Documents routed to an individuals or groups inbox.)
- X:** Deleted (Documents that have been soft deleted.)
- C:** Corrupt (Documents that have been determined to be corrupt or of incorrect resolution.)
- Y:** Source Copy (Large multi-page TIFF files that have been separated into smaller sections are retained.)

### Standardized Object Status Codes

- A:** Xtractor (Documents to be processed by Xtractor Recognition.)
- R:** Data Exchange (Documents to be processed by Data Exchange Service.)
- V:** RapidDoc (Documents to be processed by RapidDoc stations.)
- M:** MultiFunction (Documents to be processed by MultiFunction Service.)

## Appendix 3 – iSynergy Service

iSynergy Service is a Windows service installed on the iSynergy web server that is responsible for:

- Monitoring the incoming folders for all iSynergy applications. When the folders are dropped in, iSynergy Service enters a record in the appropriate database for the files.
- Moving each file to the proper repository and renaming the file with the correct file name.
- Monitoring printing activity in the iSynergy system and writing a record to the event log each time a tiff image is printed from the system.
- Assisting the export function to write image files and data for the selected export.
- Supporting the import function by reading the import files, and inserting the records into the database as well as the images into the repository.
- Maintaining the directory structure in the repository with regard to the application subfolders.

### Troubleshooting iSynergy Service

The following common problem is encountered when a User attempts to print a Document when the iSynergy service is not running.

***ERROR: iSynergy server is not responding to print requests.***

To troubleshoot this error message, follow these steps:

1. Navigate to the **Windows Start Menu**.
2. Right-click **My Computer**.
3. Select **Manage**.

*Note: The Computer Management dialog displays.*

4. Expand **Services and Applications**.
5. Select **Services**.
6. In the right pane, right-click **iSynergy Services**
7. Select **Start**.
8. Log back into iSynergy and verify that Documents will now print.

## Error Codes

Code	Error	Description
-1	INVALID_PRIMARY_KEY	Error during database I/O that returns a primary key.
-7	EXCEPTION_ENCOUNTERED	Negative return codes
-666	UNINITIALIZED_INTEGER	Negative return codes
0	SUCCESS	Always zero
<b>1000 - 2000 block – O/S Errors</b>		
1001	FILE_NOT_FOUND	O/S Errors
1002	FILE_INSUFFICIENT_PERMISSIONS	O/S Errors
1003	FILE_LOCKED	O/S Errors
1004	IO_ERROR	O/S Errors; An external process that started, failed.
1005	EXTERNAL_PROCESS_FAILED	O/S Errors
1006	UNABLE_TO_OPEN_FILE	O/S Errors
1007	INVALID_CMD_LINE_ARG	O/S Errors
<b>2000 – 3000 block – Database Errors</b>		
2001	DB_UNABLE_TO_CONNECT	Database Error
2002	DB_SQL_ERROR	The database query returned an SQL error.
2003	DB_REQUIRED_FIELD_MISSING	A required field is missing a value.
2004	DB_CONNECTION_CLOSED	The underlying connection to the database is closed.

2005	DB_INSUFFICIENT_PERMISSIONS	The account accessing the database lacks permission to perform the current operation.
2006	DB_CONFIGURATION_ERROR	The database configuration file is incorrect.

Code	Error	Description
<b>3100 – 3200 block – Security errors, authentication and authorization</b>		
3100	INVALID_CREDENTIALS	The user could not be authenticated with the given credentials.
3101	INSUFFICIENT_PERMISSIONS	The user does not have access to a document or process.
3102	ACCOUNT_DISABLED	The user's account has been disabled or set inactive.
3103	ACCOUNT_CLOSED	The user's account has been closed permanently.
3104	PASSWORD_EXPIRED	The user's account has an expired password.
3105	MISSING_CREDENTIALS	A SOAP request was received without user credentials such as a UsernameToken.
3106	USER_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
3107	PASSWORD_ID_DOES_NOT_MEET_REQUIREMENTS	The password does not match the regular expression defined for validation.
<b>3300 -3400 block – DocumentServer Errors</b>		
3301	INVALID_URI	The URL does not contain the necessary elements.

3302	APPLICATION_NOT_FOUND	The application specified by a database alias and application does not exist in the database.
3303	DOCUMENT_NOT_FOUND	The document specified by a database alias, application id and document id does not exist in the database.
3304	USER_NOT_FOUND	The given user id could not be found in the database.
3305	APPLICATION_NOT_IMPLEMENTED	Documents can only be served within implemented applications.
3306	DOCUMENT_SERVER_DOWN	The document server is not accepting requests.
3310	APPLICATION_NOT_LICENSED	The requested document belongs to an application that is unlicensed.
3311	LICENSING_NOT_INITIALIZED	The licensing manager has not been initialized.
3312	INVALID_LICENSE	The license file is corrupt.

Code	Error	Description
<b>20000 -20099 block – Data Object Model</b>		
20001	INVALID_DATA	Data Object Model
20002	INVALID_TYPE	Data Object Model
20003	INVALID_DATABASE_TYPE	Data Object Model
20004	EXCEPTION_EXECUTING_SQL	Data Object Model
<b>20100 – 20199 block – Data Object Model</b>		
20101	INACTIVE_TASK	Workflow Object Model
20102	INACTIVE_PROCESS	Workflow Object Model

20103	UNAUTHORIZED_SUBSCRIBER	Workflow Object Model
20104	NO_PRECEDING_TASK	Workflow Object Model
<b>20200 -20399 block – Image, Document Centric Errors</b>		
20200	INVALID_DOC_TYPE	Image, document centric errors an invalid document type was accessed given the current context.
20201	OCR_FAILURE	Unable to OCR document.

## Basic SQL Statements

The below examples have been provided to help you create a basic SQL statement for use in iSynergy.

### View Specific Records in Tables

- Select \* from <table> where <column name> = 'string' ex. Select \* from \_obj\_2 where IDX\_SSN = '111-22-3333'
- Select \* from <table> where <column name> like '%partial string%'

*For example, Select \* from \_obj\_2 where IDX\_SSN like '%111-22-3%'*

### Update Specific Records in Tables

When using this SQL Statement, do not forget the specific where clause to the record you are updating or you might update the entire table in error. Ensure you have isolated a unique record with the where clause.

9. Update <table>

10. Set <column name> = 'correct data'

11. Where <column name> = 'current value' and <column name> = 'current value'

*For example, (1) Update \_obj\_2, (2) Set IDX\_SSN = '111-22-3333' (3) Where objectid = 2 and IDX\_Name = 'John Doe'*

### View Data Events

The below select statement is looking for all status changes in the object 2 table that were "P" status prior to being changed.

*Note: You can change the oldvalue parameter, objtable parameter and eventdesc as needed to create the correct search criteria.*

- `select * from eventlog where oldvalue = 'P' and objtable = '_obj_2' and eventdesc = 'status'`

## View current Group/User Level Permissions

The statement below is for Users:

- Select permissions.permissionname, users.username
- From users, permissions, userpermissions
- Where userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid

The statement below is for Groups and Users.

- Select distinct users.username, permissions.permissionname, applications.name, usergroups.groupname
- From applications, users, permissions, userpermissions, usertogroup, grouppermissions, usergroups
- Where applications.applicationid = grouppermissions.applicationid and userpermissions.permissionid = permissions.permissionid and users.userid = userpermissions.userid and usertogroup.usergroupid = usergroups.usergroupid

## iSynergy Web Server, Database and Image Store

